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# Foreign CROPS AND MARKETS

(FOR RELEASE MONDAY, APRIL 25, 1955)

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UNITED STATES DEPARTMENT OF AGRICULTURE  
FOREIGN AGRICULTURAL SERVICE  
WASHINGTON 25, D. C.

BURMA AS A MARKET  
FOR U.S. SEEDS

The prospects of developing a market for United States seed in Burma are rather remote, according to W. H. Youngman, seed marketing specialist of the Foreign Agricultural Service, who has just completed a study of the seed situation in that country. Burma lacks funds for international trading and permits importation of only a few items from the United States. The Government is trying to stimulate domestic seed production for all kinds of crops.

Grass and legume seeds are practically unknown in Burma. There is some intention of improving the communal pastures but the problems of regulating grazing and the lack of water during the dry season are major obstacles.

Vegetable production is neither well organized nor highly developed, but more than 20 kinds of vegetables were found in the markets. Local areas of production are of major importance because of the uncertainty of rail and river transportation from northern areas where much of the supplies were formerly procured.

In Burma the crops change with the seasons but there is year-around production. The rainy season seems to be the most difficult since crops do not pollenize normally during heavy rain. This is said to affect most adversely the production of tomatoes, cucumbers, and squash.

Flower seeds are collected and distributed to local residents who request them. Group procurement or agency procurement is most generally employed.

FOREIGN CROPS AND MARKETS

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## WORLD HARD FIBERS PRODUCTION INCREASES IN 1954

World production of the principal hard fibers - sisal, henequen, and abaca - continued its upward trend in 1954, and reached an estimated 1,421.6 million pounds, or 25 percent greater than the prewar 1934-38 average of 1,141.3 million pounds. Production in the past year increased by 5 percent over 1953, by 37 percent over the average of the early postwar years of 1946-50, and 16 percent over the early war average of 1939-40. The current large output is chiefly the result of expanded acreages of sisal during the years of favorable prices and demand.

Percentage of Total

Sisal at 65 percent was not only largest in percentage of total production of these 3 hard fibers in 1954 (See table below), but accounted for the greatest increase in production over earlier years. It was 44 percent of the total before the war.

Henequen accounted for nearly 18 percent of the total compared with 16 percent in 1953 and 22 percent in prewar years. Although the quantity of henequen is larger than the prewar average, it accounts for a smaller percent of the total because of the much greater increase in sisal included in total fibers.

Abaca production has declined since 1951 in both quantity and percentage of the total. It represented 34 percent of the total in 1934-38, but only slightly over 17 percent in 1954, and dropped in rank from second to third place. Actually, abaca production was about equal to henequen production in 1954, with less than 50,000 pounds difference, according to preliminary estimates.

Production of the 3 principal cordage fibers in terms of percentages of the total

Calendar years	Sisal	Henequen	Abaca	Total
	Percent	Percent	Percent	Percent
1934-38 (prewar average)	44	22	34	100
1939-40 (early war average)	47	20	33	100
1941-45 (war years average)	56	32	12	100
1946-50 (postwar average)	53	27	20	100
1951 1/	57	19	24	100
1952 1/-	60	18	22	100
1953 2/	63	16	21	100
1954 2/	65	18	17	100

1/ Revised

2/ Preliminary.

Foreign Agricultural Service. Calculated from data in production table.

FIBERS: World production of the principal hard fibers, representative prewar average to 1954.

Commodity and country	Averages					Calendar years					
	Early war		War years		Postwar	1950		1951	1952	1953	1954
	Prewar (5-year) 1934-38	years (2-year) 1939-40	(5-year) 1941-45	War years (5-year) 1946-50	(5-year) 1946-50	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
<u>Sisal</u>											
British East Africa.....	261.0	295.9	291.6	334.7	364.0	420.0	446.8	456.9	478.2		
Indonesia 2/.....	166.8	206.0	118.7	5.0	5.4	22.6	53.7	54.5 2/	52.0		
Mozambique 4/.....	32.3	25.0	35.6	38.4	41.4	41.4	41.9	48.2	54.4		
Haiti 5/.....	13.4	17.9	23.0	48.0	59.1	45.6	40.6	41.8 3/	47.0		
Angola (Portuguese West Africa) 6/.....	11.3	14.6	21.3	36.8	47.8	51.1	55.3	69.0	62.0		
French West Africa.....	9.8 3/	6.9 3/	5.9	4.2	4.8	4.9	3.5	3.3 3/	3.0		
Madagascar.....	5.3	5.8	5.0	6.7	8.8	15.5	18.1	19.8 2/	20.0		
Belgian Congo 7/.....	0.7 3/	0.2	0.4	0.5	0.6	0.6	0.6	0.6 3/	0.5		
Brazil.....	8/ 3/	0.1 3/	3.1	55.7	115.7	138.9	132.3	132.3	181.1		
Venezuela.....	0.1	0.4 3/	2.1	5.9	6.5	17.6	19.8	19.8 3/	10.0		
Formosa (Taiwan).....	8/ 3/	2.1	2.2	3.0	2.4	2.5	2.8	1.5	8/		
Other British Africa 3/.....	3.1	1.1	1.0	4.5	5.3	5.2	4.5	3.6	2.1		
Other French Africa.....	8/	8/ 3/	0.2	1.2	1.8	3.4	4.5	6.2 3/	4.0		
Other Western Hemisphere 2/.....	2.0	1.2	1.2	1.7	3.0	1.8	1.8	2.6	3.5		
Other countries 9/.....	1.6	0.3	0.4	3.0	5.7	4.4	2.6	2.1	3.6		
Total sisal.....	507.4	577.5	511.7	549.3	672.3	775.5	828.8	862.2	921.4		
<u>Henequen</u>											
Mexico.....	212.1	200.5	256.7	243.9	222.9	210.4	214.5	180.2	211.4		
Cuba.....	28.2	35.4	27.5	31.1	34.6	36.2	27.6	25.5	32.7		
El Salvador.....	6.4	7.5	8.3	6.4	6.3	6.0	7.4 3/	7.7 3/	6.0		
Other countries 9/.....	-	-	10/	0.4	0.6	0.5	0.4	0.1	10/		
Total henequen.....	246.7	243.4	292.5	281.8	264.4	253.1	249.9	213.5	250.1		

Abaca											
Philippines, Republic of 11/.....	375.5	387.6 : 3/	100.8	170.8	213.4	278.1	247.4	241.6 : 11/	220.9		
Indonesia 2/.....	7.7	9.5	2.9	3.8	10.1	13.9	13.0	6.0 : 3/	5.5		
British North Borneo.....3/	4.0 : 2/	4.3	8/ : 3/	1.2	1.5 : 6/	0.3 : 6/	0.8 : 6/	2.6 : 3/	3.5		
Central America:											
Panama.....	- : 12/	0.1 : 12/	4.0 : 12/	7.6	6.8	7.1	9.5	6.3	3.2		
Costa Rica.....	-	-	1.5	7.7	4.7	4.9	12.0	11.5	7.3		
Guatemala.....	-	-	1.1	7.8	8.6	9.2	10.5	9.3	6.4		
Honduras.....	-	- : 12/	0.7 : 12/	5.8	4.6	3.4	2.1	4.6	2.7		
Total Central America.....	- : 12/	0.1 : 12/	7.3 : 12/	28.9	24.7	24.6	34.1	31.7	19.6		
Other countries 9/.....	-	-	0.6	1.0	1.5	1.5	1.3	0.7	0.6		
Total abaca.....	387.2	401.5	111.6	205.7	251.2	318.4	296.6	282.6	250.1		
Total sisal, henequen, and abaca.: 1,141.3	1,222.4	915.8	1,036.8	1,187.9	1,347.0	1,375.3	1,358.3	1,421.6			

1/ Preliminary.

2/ Estimated for 1934 and 1941 at less than 95 percent of total exports of hard rope fibers was sisal, and between 2 and 4 percent was abaca; for 1935 to 1940 at approximately 90 percent of total production of hard rope fibers was sisal and 4 percent was abaca; and beginning 1942 from incomplete data on production and trade.

3/ Foreign Agricultural Service estimates based on incomplete data.

4/ Exports excluding tow for crop years ending June 30 for 1934 and 1935. Production including tow for calendar years, beginning 1936.

5/ Exports including decorticated fiber, tow, waste, and peasant-cleaned sisal for calendar years 1934 to 1945. Production prior to 1946 is believed to be greater than exports by no more than one million pounds in any one year. Production data beginning 1946 including tow and machine-cleaned peasant production, and excluding flume waste beginning 1947.

6/ Exports which are approximately equal to production, or production estimates based on trade data.

7/ Includes Ruanda-Urundi.

8/ Not available.

9/ Includes countries not listed and estimates for producing countries for which no data are available.

10/ Less than 50,000 pounds.

11/ Converted on basis of 278.88 pounds to the bale. Data include only fiber inspected by the Philippine Fiber Inspection Service and represent generally only 90 to 95 percent of the total Philippine production. At least 0.8 million pounds of uninspected fiber were manufactured into rope for export during 1954.

12/ Tow excluded in data for Panama prior to 1947, and for Honduras prior to 1949.

Foreign Agricultural Service. Compiled from official statistics of foreign governments, reports of Foreign Service Officers, and estimates based on available information.



### Prices

The downward trend, begun in 1951, of prices of hard fibers continued through 1954, but firmed somewhat in early 1955. The average price of British East African sisal No. 1, landed New York, was about 11.1 cents a pound in 1954 compared with 12.4 cents in 1953, 29.7 cents in 1951, and 5.1 cents in 1935-38. The range of monthly averages in the past year was between a high of 13.1 cents in February and a low of 9.3 cents in November.

Hanequen prices (Mexican Grade A, New York) averaged 8.6 cents a pound in 1954 compared with 10.2 cents in 1953, 24.5 cents in 1951, and 5.1 cents in 1935-38. Philippine abaca (Davao I, New York) was 18.6 cents a pound, compared with 24.3, 32.1, and 7.5 cents, respectively, in 1953, 1951, and 1935-38.

### Production by Continents

Africa ranks first among the continents in production of the 3 principal hard fibers, with 624.7 million pounds of sisal and 0.5 million pounds of abaca. These account for 44 percent of the world total of hard fibers. British East Africa is the principal producing country.

The Western Hemisphere ranks second in production with 36 percent of the total, comprising 241.6 million pounds (26 percent) of the world supply of sisal, 250.1 million pounds (100 percent) of the henequen, and 19.7 million pounds (8 percent) of the abaca of the world. Brazil produces most of the Western Hemisphere sisal, and Mexico most of the hanequen.

Asia, with 20 percent of the hard fibers, produces only 55.1 million pounds (6 percent) of the world sisal supply but 229.9 million pounds (or 92 percent) of the world abaca supply. The Philippines supplies most of the abaca.

### Sisal Production

World sisal production in 1954 is estimated at 921.4 million pounds, or 7 percent more than the 1953 total of 862.2 million pounds, 11 percent more than in 1952, 68 percent more than the average in the early postwar years, and 82 percent more than the average in prewar years. See production data in the table on pages 479 and 480. Production increased each year since 1946, and by 1950 had exceeded the previous peak of 608.4 million pounds in 1943.

### Henequen Production

World henequen production, limited entirely to the Western Hemisphere, was estimated at 250.1 million pounds compared with 213.5 million in 1953 and a prewar average of 246.7 million pounds. Mexico, Cuba, and El Salvador are practically the only producing countries.



Abaca Production

World abaca production declined during the past 3 years and in 1954 was considerably less than in prewar years. The reduction was principally in the Philippines where the largest growing areas are located. Total production was estimated at 250.1 million pounds compared with 282.6 million in 1953, and a prewar average of 387.2 million pounds.

Summation

The immediate future for hard fibers can be seen as of the close of 1954 to offer little hope to the producers in regard to higher price levels. Sisal production seems to be expanding in major producing areas despite lower prices, henequen output continues to show no great change in trend from year to year, and abaca fiber supplies have undoubtedly begun a downward trend for the immediate future.

**CHINESE-POLISH  
TRADE AGREEMENT**

On March 22, 1955, a trade and payments agreement was signed between Communist China and Poland facilitating the exchange of Chinese tobacco for Polish industrial goods. Poland will supply factory installations, machines, transport equipment and other products useful in the industrialization of China. The Chinese will ship tobacco and other raw materials in payment.

**ALGERIAN CONSUMPTION OF TOBACCO  
PRODUCTS UP IN 1954**

Lewis Clark, American Consul General at Algiers, Algeria reports that consumption of tobacco products in Algeria increased from 13.6 million pounds in 1953 to 14.7 million in 1954. Most of the increased consumption was in the form of cigarettes while cigars, snuff and chewing tobacco showed some increase.

Imports of unmanufactured tobacco and cigarettes from the United States were very small compared to total imports in 1954. The United States supplied .5 million pounds of leaf out of a total of 11.3 million imported from all sources. Twenty-two thousand pounds of United States cigarettes were imported out of total cigarette imports of 159 thousand pounds.

There is little chance that Algerian imports of United States leaf will increase in 1955. The French Government will probably allocate a generous supply of "compensation," dollars for tobacco, but merchants have to buy them at the rate of 400 francs per \$1.00 instead of the usual rate 350 francs per \$1.00. This added cost makes dollar tobacco very expensive to manufacturers.

Algerian leaf exports in 1954 reached the highest level in the postwar period. As shown below the major markets are in France and allied areas. Exports will probably not be this large during 1955 as efforts are being made to take areas out of tobacco production that produce a poor-quality leaf.

Exports of Leaf Tobacco

<u>Country of Destination</u>	<u>1953</u>	<u>1954</u>
	1,000	1,000
	<u>pounds</u>	<u>pounds</u>
France	21,815	28,142
French Allied Areas	4,657	3,082
Hungary	1/	2,463
Other	1,133	125
Total	27,605	33,812
1/ Included in other if any		

In addition to the export of unmanufactured tobacco, Algeria has a large export trade with the French Union in tobacco products, especially cigarettes. During 1954, 12.9 million pounds of cigarettes were exported, nearly 46 percent of estimated production. French West Africa, the largest market, took 7 million pounds or roughly 320 million cigarettes out of this total with other members of the French Union taking smaller amounts.

1955 AUSTRALIAN SULTANA CROP  
DAMAGED BY RAIN

Reports indicate that the quality of 1955 Australian sultanas will be considerably below that of the 1954 crop. Packers in Australia are reported as experiencing extreme difficulties in processing and packing due to damage to the fruit caused by rain. It appears that this will be an unusually prolonged packing season in Australia. Demand in the United Kingdom for 1954 Australian sultanas, a high-quality pack, has become much stronger.

ASIA'S PRINCIPAL RICE IMPORTS  
BY COUNTRY OF ORIGIN

The accompany tables show the trends in the last 2 decades of rice imports into the principal importing countries of Asia. While rice imports into these deficit countries have increased to some extent above the immediate postwar level, imports still are markedly below those of the pre-war period.

RICE (in terms of milled): Imports into principal importing countries of Asia,  
by country of origin, average 1935-39, annual 1947-54

Importing country and countries of origin	Average 1935- 1939	1947	1948	1949	Average 1947- 1949	1950	1951	1952	1953	1954
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
<u>Ceylon</u>										
Burma.....	2/ 985	320	674	611	535	897	831	496	315	374
Indochina.....	23	0	0	0	0	0	0	51	0	0
Brazil.....		177	39	0	72	0	0	0	0	0
Thailand.....	202	0	23	119	47	140	0	34	0	0
Egypt.....	0	84	181	111	126	62	0	0	0	0
Italy.....	0	0	0	49	16	0	0	0	0	0
Pakistan.....	-	0	0	0	3/	0	55	13	0	0
China.....	0	0	0	0	0	0	0	80	584	480
United States.....	0	0	0	0	0	0	0	134	5	0
Other countries.....	8	0	0	0	0	0	0	86	0	33
Total.....	1,218	581	917	890	796	1,099	886	894	904	887
<u>India</u>										
Burma.....	6/ 3,241	827	1,129	837	931	421	681	842	336	1,495
Indochina.....	219	0	0	0	0	0	0	0	0	0
Thailand.....	40	59	349	639	349	249	484	412	0	0
Pakistan.....	-	0	158	0	53	0	354	31	52	0
Egypt.....	0	67	155	198	140	120	11	0	0	0
China.....	0	0	0	0	0	0	148	331	0	0
Brazil.....	0	97	116	0	71	0	0	0	0	0
Italy.....	0	0	0	44	14	0	0	0	0	0
Other countries.....	1	72	52	2	42	0	0	1	37	0
Total.....	3,501	1,122	1,959	1,720	1,600	790	1,678	1,617	425	1,495
<u>Malaya</u>										
Burma.....	514	250	426	362	346	52	119	157	260	-
Indochina.....	72	0	49	6	18	26	117	79	88	-
Thailand.....	1,057	216	314	614	382	946	1,020	926	856	-
Brazil.....	0	39	40	0	26	0	0	0	0	-
Italy.....	0	0	0	22	7	0	25	0	0	-
Australia.....	0	18	15	18	17	0	0	0	0	-
Egypt.....	0	13	127	129	90	0	0	0	0	-
Philippines.....	0	0	37	0	12	0	0	0	0	-
Other countries.....	24:3/	536	1,010	1,161	902	1,024	1,281	1,162	1,204	-
Total.....	1,667	536	1,010	1,161	902	1,024	1,281	1,162	1,204	-



RICE (in terms of milled): Imports into principal importing countries of Asia,  
by country of origin, average 1935-39, annual 1947-54 - Continued

Importing country and countries of origin	Average 1935- 1939	1947	1948	1949	Average 1947- 1949	1950	1951	1952	1953	1954
Japan										
Thailand.....	68:	Data by:	185:	Data by:	725:	560:	699:	961:	820	
Burma.....	2:	country:	99:	country:	320:	354:	278:	423:	706	
Taiwan.....	1,529:	not	0:	not	0:	157:	135:	119:	81	
Korea.....	2,644:	avail-:	3/	avail-:	198:	0:	0:	0:	0	
United States.....	-	able	able	14:	113:	89:	516:	396:	758	
Egypt.....	0:	"	"	0:	54:	384:	0:	0:	0	
Italy.....	0:	"	"	0:	0:	19:	239:	61:	150	
Spain.....	0:	"	"	0:	0:	0:	103:	85:	130	
Mexico.....	0:	"	"	0:	22:	0:	4:	0:	0	
Belgium Congo.....	0:	"	"	0:	7:	3:	0:	0:	0	
Iran.....	0:	"	"	0:	0:3/	0:	3:	45:	0	
Nicaragua.....	0:	"	"	0:	0:	0:	3:	8:	6	
Uruguay.....	0:	"	"	0:	0:	0:	10:	0:	21	
Portugal.....	0:	"	"	0:	0:	0:	3:	21:	0	
Pakistan.....	0:	"	"	0:	0:3/	0:	15:	120:	52	
Brazil.....	0:	"	"	0:	0:	13:	0:	7:	0	
Indochina.....	-	"	"	0:	0:	0:	0:	109:	92	
Ecuador.....	0:	"	"	0:	0:	0:	58:	0:	63	
Peru.....	0:	"	"	0:	0:	0:	0:	21:	48	
Communist China.....	0:	"	"	0:	0:	15:	0:	0:	98	
Other countries.....	2:	"	"	1:	41:	155:	91:	20:7/	76	
Total.....	8/ 4,245:	6:	124:	299:	143:	1,480:	1,749:	2,157:	2,396:	3,101
Philippines										
Burma.....	0:	0:	9:	43:	17:	0:	0:	66:	0	
Thailand.....	36:	39:	145:	87:	90:	7:	284:	66:	33	
United States.....	3/	217:	0:	126:	115:	1:3/	7:	0:	0	
Ecuador.....	0:	20:	51:	41:	37:	0:	0:	0:	0	
Egypt.....	0:	0:	16:	24:	13:	0:	0:	0:	0	
Indochina.....	76:	0:	0:	0:	0:	0:	1:	0:	0	
Mexico.....	0:	0:	22:	0:	7:	0:	0:	0:	0	
Pakistan.....	-	-:	0:	0:	0:	0:	0:	0:	0	
Other countries.....	5:	0:	22:	0:	8:	0:	1:	0:	61	
Total.....	117:	276:	265:	321:	287:	8:	286:	139:	0:	94

Continued

RICE (in terms of milled): Imports into principal importing countries of Asia,  
by country of origin, average 1935-39, annual 1947-54 - Continued

Importing country and countries of origin	Average:										:1953 1/: 1954 1/
	: 1935- 1939	: 1947 :	: 1948 :	: 1949 :	: 1947- 1949	: 1950 :	: 1951 :	: 1952 :	: 1953 1/: 1954 1/	: 1953 1/: 1954 1/	
	Million pounds	Million:Million:Million:Million:Million:Million:Million:Million:Million:Million:Million	Million:Million:Million:Million:Million:Million:Million:Million:Million:Million:Million	Million:Million:Million:Million:Million:Million:Million:Million:Million:Million:Million	Million:Million:Million:Million:Million:Million:Million:Million:Million:Million:Million	Million:Million:Million:Million:Million:Million:Million:Million:Million:Million:Million	Million:Million:Million:Million:Million:Million:Million:Million:Million:Million:Million	Million:Million:Million:Million:Million:Million:Million:Million:Million:Million:Million	Million:Million:Million:Million:Million:Million:Million:Million:Million:Million:Million	Million:Million:Million:Million:Million:Million:Million:Million:Million:Million:Million	Million:Million:Million:Million:Million:Million:Million:Million:Million:Million:Million
Indonesia											
Burma	251:	106:	132:	192:	143:	430:	449:	413:	440:	440:	297
Thailand	250:	96:	181:	209:	162:	152:	273:	497:	120:	120:	104
Indochina	80:	19:	0:3/		6:	0:	116:	148:	88:	88:	102
United States	0:	0:	21:	77:	33:	173:	58:	88:	112:	112:	0
Brazil	0:	0:	42:	0:	14:	0:	0:	344:	0:	0:	0
Philippines	0:	36:	22:	0:	19:	0:	0:	0:	0:	0:	0
Mexico	0:	0:	0:	40:	13:	0:	0:	0:	0:	0:	0
South America	0:	0:	0:	21:	7:	0:	0:	5:	0:	0:	0
Italy	0:	0:	0:	0:	0:	0:3/		64:	5:	5:	0
Taiwan (Formosa)	0:	0:	0:	0:	0:	0:		40:	0:	0:	0
Other countries	41:	0:	0:	2:	1:	0:	111:9/	74:	24:	24:	0
Total	622:	257:	398:	541:	398:	755:	1,007:	1,673:	789:	789:	503
Hong Kong											
Burma	75:	75:	81:	38:	65:	18:	0:	36:	72:3/	72:3/	0
Communist China	4:	0:	0:	0:	0:	48:	109:	13:	7:	7:	0
Indochina	464:	11:	27:	2:	13:	22:	44:	26:	35:	35:	13
Thailand	575:	85:	132:	120:	112:	340:	229:	406:	551:	551:	211
Macao		0:	0:	0:	0:	6:	19:	0:3/			6
South America	2:	0:	0:	0:	0:	0:	0:	5:	0:	0:	0
United States	0:	0:	0:	0:	0:	0:	0:	18:	0:	0:	0
Italy	0:	0:	0:	0:	0:	0:	7:	13:	17:	17:	0
Egypt	0:	20:	9:	0:	10:	0:	0:	0:	0:	0:	0
Other	2:	0:	0:	0:	0:	0:	0:	0:	5:	5:	0
Total gross exports	1,122:	191:	249:	160:	200:	434:	408:	522:	687:	687:	230

1/ Preliminary. 2/ Including British India until 1937. 3/ Less than 500,000 pounds. 4/ 64 million pounds from other countries in Asia, and 21 million from other countries in America. 5/ 31 million pounds from Iran. 6/ Burma was separated from India in 1937, making India an importing country rather than an exporter. 7/ Includes 67 million pounds from Ceylon. 8/ Largely brown rice. 9/ Includes 40 million pounds from Portugal, and 22 million pounds from Spain.

Compiled from official sources and trade information available in reports of Agricultural Attaches and other U. S. representatives abroad.



Prior to World War II, virtually all rice imports came from Burma, Thailand, and Indochina. Because of reduced production in these countries during the war, however, and ensuing rice shortages and high prices, until 1954 importers could not obtain all their rice requirements from these countries.

As a result of the sharp decline in the export supplies of rice available from the exporting countries of Asia during and following the war, rice producers in all areas outside of Asia, including the United States, increased export availabilities to help meet the needs of the rice importers.

#### SOUTH AFRICA MAY NEED U. S. FLUE-CURED TOBACCO

Rhodesian Tobacco Officials at their April meeting decided to limit exports of flue-cured tobacco for the Union of South Africa to not more than 5 million pounds this season. As present estimates place South Africa's requirements at 12 million pounds, it is possible that some Rhodesian leaf will be reexported from the United Kingdom. In addition, it is estimated that the Union will need to buy at least 5 million pounds from the United States partially to make up this deficiency.

#### WORLD CATTLE POPULATION STILL INCREASING; BEEF OUTPUT RISING

World cattle numbers continued to increase last year for the eighth consecutive year and now are estimated at 877 million, 1 percent greater than a year earlier and 18 percent above prewar. Numbers have increased 14 percent since 1946-50, according to the latest information available to the Foreign Agricultural Service.

Cattle numbers increased in all major regions of the world during 1954. Numbers increased 2 percent in South America and 1 percent each in North America, Asia, Europe, Africa, and Oceania.

The increase in the world total during 1954 was about 10 million head; about the same as a year earlier, but much below that of the previous few years when cattle numbers were undergoing a rapid expansion. Compared with prewar, numbers are particularly large in Africa, North and South America and in Oceania. In Europe and Asia they are only moderately above prewar.

The continued increase in numbers during 1953 and 1954 was reflected in larger cattle slaughter and increased world beef output. A further increase in beef production is likely in 1955 but the extent of the increase will depend primarily upon the course of cattle numbers in the main producing countries. Supplies of beef for export promise to be large again this year in Australia and New Zealand, but supplies from the principle exporting countries of South America will be relatively small as in 1954.



It now appears that relatively small amounts of beef and few cattle will be available for export from Mexico. On the other hand, in recent years beef output has been rising in the United Kingdom (the chief import market of the world), in other European countries and the United States, which also are important importers. Output of beef in Canada, which is at a high level, is increasing thus providing larger supplies for export. Increased purchases by the U.S.S.R. in South America, Oceania, and Europe are absorbing some of the increased production of beef.

Cattle numbers in North America increased nearly 2 million head during 1954. Numbers in the United States increased slightly, but most of this increase was in the number of cattle being grain fattened for slaughter. Apparently numbers in Mexico have not changed much in recent years.

Drought over large areas of northern Mexico, which has seriously affected the cattle industry for several years, was broken in late 1953 and 1954. Cattle numbers in northern Mexico, which have been most seriously affected by the droughts, are much below normal and increased numbers in southern and central Mexico have about offset the decreases elsewhere. Cattle numbers in Canada continue to increase. The 9.5 million on farms December 1, 1954 was the largest for that date since 1946.

Cattle numbers increased moderately in both eastern and western Europe in 1954. The increase was general, with almost every country showing a gain. Numbers continue to increase in the leading countries--France, the United Kingdom and Italy, but decreased slightly in Western Germany.

Numbers in the Eastern European countries on the whole continue to increase and substantial gains have been noted since the end of World War II in most countries. Cattle numbers in the U.S.S.R. continued to increase slightly between October 1953 and October 1954.

Cattle numbers in China are moderately above prewar and considerably above the low-level of 1946-50, on the basis of reports appearing in the Chinese press and radio. They have also increased steadily in India, Indonesia, and Taiwan. Cattle numbers in South Korea have increased sharply since the end of the fighting there, and numbers in Japan are at relatively high levels. The cattle population in the Philippines has recovered substantially from the low levels of World War II but apparently is not up to prewar.

There was a fairly large increase in cattle numbers in South America last year. The population either was maintained or increased in most of the important producing countries.

Cattle numbers continue to increase in Africa with increases being shown for most important countries, except Egypt, and the Union of South Africa.

CATTLE: Number in specified countries, averages 1936-40 and 1946-50, annual 1950-1955

Continent and Country	Month of estimate	Average		1950	1951	1952	1953	1954	1955
		1936-40	1946-50						
		Thousands	Thousands	Thousands	Thousands	Thousands	Thousands	Thousands	Thousands
<b>NORTH AMERICA</b>									
Canada	Dec. 1 1/	8,246	8,883	8,243	8,292	7,936	8,906	9,371	9,473
Costa Rica	July	366	556	666	685	—	—	696	—
El Salvador	July	680	700	—	825	—	615	—	—
Guatemala	July	520	900	903	—	—	—	—	—
Honduras	July	524	1,000	950	—	1,140	1,175	—	—
Mexico	Dec. 31 1/	11,716	13,530	14,455	14,700	15,000	15,000	15,000	15,800
Nicaragua	3/	800	1,235	1,275	1,275	1,182	1,250	1,200	—
Panama	3/	434	567	—	577	—	600	—	—
United States	Jan. 1	66,706	78,951	77,963	82,025	87,844	93,637	94,787	95,433
Cuba	Dec. 31 1/	5,024	4,500	4,550	4,600	4,440	4,000	4,000	—
Dominican Republic	July	885	887	887	857	860	—	—	—
Estimated total	3/	96,700	112,600	112,200	116,800	122,400	128,800	130,500	132,300
<b>EUROPE</b>									
Austria	Dec. 31 1/	2,600	2,173	2,203	2,460	2,400	2,347	2,300	2,304
Belgium	Jan. 1	1,724	1,674	1,902	2,020	2,127	2,151	2,213	2,252
Denmark	Dec. 31 1/	3,108	2,881	2,886	2,974	2,932	2,953	2,999	3,089
Finland	June 15	1,850	1,598	1,783	1,814	1,851	1,809	1,885	—
France	Oct. 1 1/	15,504	15,067	15,404	15,808	16,235	16,194	16,889	17,273
Greece	Dec. 1 1/	12,114	10,831	10,883	11,148	11,375	11,641	11,641	11,521
Ireland	Dec. 31 1/	1,278	742	732	809	915	976	1,008	1,040
Italy	June	4,021	4,093	4,322	4,376	4,309	4,397	4,504	9,250
Luxembourg	Jan. 1	8,550	7,838	8,325	8,331	8,376	8,690	8,994	127
Netherlands	Dec. 1 1/	108	114	115	118	124	2,934	—	—
Norway	May	2,693	2,471	2,723	2,863	2,858	—	3,026	—
Portugal	June 20	1,390	1,226	1,237	1,231	1,152	1,150	1,181	—
Spain	Dec. 31 1/	905	975	—	—	—	—	—	—
Sweden	April 1	—	3,206	3,112	—	3,150	3,128	3,184	—
Switzerland	Summer	2,959	2,705	2,648	2,633	2,532	2,554	2,582	—
United Kingdom	April	1,663	1,471	1,590	1,607	1,682	1,635	1,593	1,595
Yugoslavia	June	8,798	9,973	10,620	10,473	10,244	10,444	10,718	—
Estimated Total	Jan.	4,281	5,322	5,236	4,789	4,885	5,055	5,157	5,283
Western Europe	—	102,600	95,800	99,600	99,400	101,100	102,400	104,000	105,000
Other Europe	—	76,500	74,400	76,700	76,600	77,200	78,200	80,100	81,000
	—	26,100	21,400	22,900	22,800	23,900	24,200	23,900	24,000
U.S.S.R. (Europe and Asia)	Jan. 1	59,800	50,800	56,000	57,200	58,800	56,600	—	—



<b>ASIA</b>									
Iran	March	2,797	2,700	3,500	3,600	4,000	5,000	5,000	5,000
Turkey 9/	Dec. 3 1/	8,611	10,826	11,001	11,076	11,363	11,708	11,803	—
British Malaya 2/	—	531	440	470	482	506	527	—	—
Burma 9/	—	6,165	5,030	—	—	5,358	5,769	6,045	6,100
Ceylon 9/	Dec. 31 1/	1,625	1,732	1,905	1,680	1,816	1,884	1,975	—
China 13/	May	25,600	23,000	23,800	24,600	26,400	28,800	—	—
India 2/	Jan. 1	180,000	178,200	181,500	180,227	199,271	—	—	—
Indonesia 2/	Dec. 31 1/	7,669	6,330	6,725	7,318	8,417	8,838	—	—
Japan	Feb. 1	1,798	2,167	2,450	2,460	2,671	2,826	2,897	—
Korea-South	Dec. 31 1/	922	646	699	393	572	658	668	—
Pakistan 9/	Dec. 31 1/	33,000	30,000	29,896	29,650	29,049	29,100	—	—
Philippine Islands 9/	Jan. 1	4,340	2,340	2,601	3,058	3,249	3,466	3,988	—
Taiwan (Formosa) 9/	Dec. 31 1/	354	307	357	365	375	383	395	—
Thailand 2/	Mar. 31	11,303	7,775	7,000	6,330	6,490	8,000	7,629	—
Estimated total 14/	—	296,300	281,400	286,300	285,500	308,600	316,400	317,500	319,100
<b>SOUTH AMERICA</b>									
Argentina	July	33,762	41,150	39,000	38,000	39,000	40,900	42,000	44,000
Bolivia	Dec. 31 1/	1,842	1,493	1,493	1,650	1,850	—	—	—
Brazil	June	40,807	46,200	—	52,655	53,513	55,854	57,626	58,000
Chile	—	2,489	2,345	2,331	2,186	2,293	2,300	—	—
Colombia	Dec. 31 1/	8,010	14,148	15,513	15,512	15,090	13,000	13,650	—
Ecuador	—	1,300	1,520	1,487	1,300	1,200	2,000	1,600	—
Paraguay	Dec. 31 1/	3,259	3,890	3,865	3,763	3,857	4,432	—	—
Peru	May	8,297	2,790	2,824	3,140	3,189	3,190	3,189	—
Uruguay	—	—	7,875	—	8,154	8,000	8,032	7,819	—
Estimated total	—	105,500	126,500	128,200	131,900	133,900	138,300	140,800	144,300
<b>AFRICA</b>									
Algeria 15/	April	841	759	765	810	846	864	—	—
Anglo-Egyptian Sudan	—	2,700	3,350	4,000	4,000	4,785	—	—	—
Kenya	Dec. 31 1/	5,239	5,150	5,550	5,650	6,260	6,510	6,650	—
Tanganyika	—	5,000	6,324	6,570	6,110	6,260	2,745	2,800	—
Uganda	Mar. 31	2,466	2,464	2,534	2,714	2,714	—	—	—
Basutoland	Feb.	437	430	—	401	—	—	—	—
Egypt 2/	July 1	2,076	2,810	2,937	3,000	3,021	2,888	20,000	—
Ethiopia (incl. Eritrea)	—	—	18,460	19,210	19,200	20,200	20,200	—	—
Federation Nyasaland and Rhodesias	Dec. 31 1/	3,187	3,912	4,163	4,152	4,165	4,192	4,274	—
French Morocco 15/	Dec. 31 1/	1,970	1,652	1,762	1,942	2,028	2,135	2,286	—
Madagascar 15/	Dec. 31 1/	5,172	5,700	5,412	5,663	5,892	5,898	5,910	—
Mozambique	Dec. 31 1/	548	632	700	738	768	797	—	—
Angola	—	2,306	1,281	1,228	1,394	1,400	1,221	1,157	—
Spanish Morocco	—	259	255	291	302	316	—	—	—
Tunisia 15/	Dec. 31 1/	494	394	359	397	475	401	483	—
Union of South Africa	August	11,636	12,285	11,513	11,565	11,768	11,655	—	—
Estimated total	—	64,400	86,600	89,300	90,500	93,700	94,300	95,300	96,600
<b>OCEANIA</b>									
Australia	Mar. 31	13,285	13,971	14,640	15,229	14,893	15,247	15,577	15,600
New Zealand	Jan. 31	4,449	4,738	4,949	5,060	5,158	5,446	5,745	—
Estimated total	—	18,100	19,100	20,000	20,700	20,500	21,100	21,700	22,000
Estimated world total	—	743,400	772,800	791,600	802,000	839,000	857,900	866,800	877,300

1/ End of year estimates (October to December) included under following year for comparisons and totals. Thus for Canada the December 1949 estimate of 8,242,000 is shown under 1950. 2/ Preliminary. 3/ Average for 2 to 4 years only. 4/ June. 5/ Census as estimate for single year. 6/ Official statistics; may be under estimates of actual numbers. 7/ September. 8/ March. 9/ Data include buffaloes. 10/ Census December 31, 1934. 11/ Cattle one year old and older. 12/ May. 13/ 1951 includes 22 provinces, Manchuria and Sinkiang. Excludes Outer Mongolia. 14/ Includes estimates for Outer Mongolia. 15/ Data include only numbers taxed.

Compiled from official sources, reports of Agricultural Attaches and other U.S. representatives abroad. Data for countries having changed boundaries relate to present territory. Totals include estimates for countries for which official statistics are unavailable. Foreign Agricultural Service, April 1955.



The trend in cattle numbers and beef production in New Zealand and Australia is still upward. In both New Zealand and Australia numbers of dairy cows and beef cattle are at high levels.

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This is one of a series of regularly scheduled reports on world agricultural production approved by the Foreign Agricultural Service Committee on Foreign Crops and Livestock Statistics. It is based in part upon reports of Agricultural Attaches and other U. S. representatives abroad.

#### AUSTRALIA FREES MEAT FOR NON-DOMINION MARKETS; NEW ZEALAND PROTESTS

On March 31, the Minister of Commerce and Agriculture of Australia announced that an agreement had been reached with the United Kingdom to permit Australian exports of an additional 13 million pounds of beef and 3.3 million pounds of lamb and mutton to destinations other than the United Kingdom during the year 1954-55 (July-June) according to James H. Boulware, Agricultural Attache, American Embassy, Canberra.

Under its long-time purchase agreement with the United Kingdom, during 1954-54 Australian exports of meat to areas other than the United Kingdom and its colonies and dependencies were limited to 13.2 million pounds of beef and lamb and 8.8 million pounds of mutton. In 1954-55, until the announced revision, "foreign" shipments were limited to 3 percent of the United Kingdom shipments or about 12 million pounds of meat (beef, lamb and mutton), plus a special addition of 15 million pounds of mutton. Australia is now free to sell to non-United Kingdom markets around 43.5 million pounds of meat. The basic 3 percent is not restricted as to class but the additional quantities must be of specific classes.

The Minister also announced that the United Kingdom had agreed to sell 13 million pounds of frozen beef held by the Ministry of foods to the "Continent or elsewhere" to relieve the pressure on cold storage facilities in the United Kingdom.

It appears that Australia will find it difficult to market the quantities of meat allocated to non-Dominion sources at prices equal to or above the levels guaranteed by the United Kingdom.

According to reports from Eugene T. Ransom, Agricultural Attache, American Embassy, Wellington, agricultural officials in New Zealand have lodged strong protests with the British Ministry of Food against the freeing of Australian meat for shipment to non-Dominion sources. It is significant that New Zealand's action in terminating its long-time purchase contract with the United Kingdom last year was prompted mainly by New Zealand's desire to seek markets outside the United Kingdom before Australia was free to do so. The present action by the Ministry of Food now nullifies most of the advantages which would accrue to New Zealand producers.

# SONORAN CATTLEMEN SEEK TO IMPORT 100,000 COWS AND HEIFERS FROM THE U. S.

The Sonoran Cattleman's Association of Mexico at their annual meeting in Hermosilio on March 12 and 13, proposed and unanimously carried a recommendation that the Association investigate the possibility of importing at least 100,000 cows and heifers from the United States to repopulate Sonoran ranges depleted by droughts. Large-scale importations of breeding cattle from the United States to Mexico would be unusual as Mexico always has been a surplus producer of beef and cattle.

Association members recommended that importations of cattle be financed through the Export-Import Bank or other institutions, at not less than 5-year terms and at rates of interest low enough to permit small cattle raisers to take advantage of the loans. Another part of the Resolution directed a request to the Mexican Government to obtain from the United States an agreement to permit importations into the United States free of United States tariffs an amount of cattle equal in weight to the cows and heifers imported by Mexico.

It was stated that losses due to drought in Sonora in recent years have amounted to more than 300,000 head.

## 21-PERCENT INCREASE IN CANADIAN PIG CROP

The number of sows to farrow during the 1955 spring season (December 1 to May 1) in Canada is indicated to be 21 percent above the number farrowed last spring, on the basis of the quarterly pig survey of March 1 of the Dominion Bureau of Statistics. The increase over last year is now expected to be much greater than the indicated 13-percent gain reported by the livestock survey of December 1, 1954.

If the prospective farrowings are realized and if the number of pigs saved per litter approximates 7.5 per sow farrowed (the average for the spring season during the last three years) the spring pig crop of 1955 will be about 5,225,000 head compared with 4,215,000 last year.

The sharp increase in spring farrowings in Canada will be followed by a somewhat corresponding increase in hog slaughter during late 1955 and early 1956, at about the same time that hogs from the prospective larger pig crop of the United States will be ready for slaughter. Canada maintains an embargo on imports of hogs and most hog products from the United States because of the presence of vesicular exanthema in the United States.



## SHELL EGG EXPORTS FROM CANADA

Venezuela and the United States continue to be the largest export markets for Canadian eggs. The Canadian Department of Agriculture reports that during the past 5 years shell eggs exported from that country have moved into a free market and not under contract. In 4 of these years exports have remained close to an average of 7 million dozen. Only in 1952 when exports were 12 million dozen was there any marked deviation from this average.

The bulk of the egg exports in this period were consigned to hard-currency countries, principally the United States and Venezuela. During this period there has been a gradual shift in the relative importance of these two markets. Venezuela was formerly a relatively small importer of Canadian eggs taking approximately 12 to 15 percent of their exports whereas the United States took about two thirds of the total. In recent years, however, Canadian exports to Venezuela have been gradually increasing and exports to the United States decreasing. By 1954, when total exports of shell eggs from Canada were 6.8 million dozen, Venezuela imported 3.2 million dozen or 47 percent of Canada's total shell egg exports and the United States imported 2.4 million dozen or 35 percent.

Although Venezuela in 1954 was the major export market available to the Canadian poultry industry, Canada was not the largest supplier to Venezuela. The United States ranked first supplying more than half of Venezuela's total egg imports and Canada ranked second.

## VENEZUELA INCREASES BABY CHICK QUOTA

James H. Kempton, Agricultural Attache, American Embassy, Caracas, reports that the Venezuelan Ministry of Agriculture has increased baby chick licenses for the second quarter of 1955 to 2,000,000 at the rate of 666,666 per month. The Government now estimates consumption per quarter at 2,200,000 chicks, but believes that local production supplies the balance. This action follows a recent scarcity of dressed poultry, retail prices of \$1.64 a pound and demands by meat vendors that the importation of frozen poultry be licensed.

## DENMARK: PRODUCTION OF DRIED ALBUMEN

Sherwood O. Berg, Agricultural Attache, American Embassy, Denmark, estimates Danish spray albumen production in the period January to mid-April 1955 at 110,000 pounds as well as 44,000 pounds of crystalline albumen in the same period. Total albumen production in 1954 is estimated at 165,000 pounds. About 77,000 pounds of albumen have been exported so far this year. The United States imported 194,000 pounds of dried egg albumen from Denmark in 1953 and 63,000 pounds in 1954, but it is not expected that Denmark will export much albumen to the United States in 1955.



BRITISH PRODUCTION OF,  
AND TRADE IN DRIED MILK

Production of dried whole milk in the United Kingdom in 1954 dropped below the high level of 1953, but was considerably above that of prewar 1938. As in earlier years, the bulk of output consisted mainly of roller powder which is used in National Dried Milk and other baby foods. Dried skimmed milk production also was well above 1953, reflecting the rise in butter production. Output also was heavier than in 1938.

United Kingdom:-Production of Dried Milk in 1954, with  
comparisons.

Type	: 1938	: 1951	: 1952	: 1953	: 1954 1/
	: 1,000	: 1,000	: 1,000	: 1,000	: 1,000
	: <u>pounds</u>	: <u>pounds</u>	: <u>pounds</u>	: <u>pounds</u>	: <u>pounds</u>
	:	:	:	:	:
Dried Whole	:17,696	:45,920	:43,232	: 51,744	: 47,936
Roller	:16,240	:43,680	:41,440	: 49,504	: 45,248
Spray	: 1,456	: 2,240	: 1,792	: 2,240	: 2,688
	:	:	:	:	:
Dried Skimmed	:34,272	: 8,960	:14,336	: 43,680	: 62,496
Roller	:16,240	: 2,016	: 4,032	: 17,696	: 26,880
Spray	:18,032	: 6,944	:10,304	: 25,984	: 35,616

1/ Preliminary

Total imports of dried milk into the United Kingdom in 1954 were about 20 percent below the preceding year. However, imports were considerably above prewar (1938). Imports of dried whole milk in 1954 were down 43 percent from 1953. The chief supplying countries were New Zealand, Australia and Ireland. Imports of dried skimmed milk declined 12 percent in 1954, but were well above those of 1938. New Zealand and Australia were the principal suppliers.

United Kingdom:-Imports of Dried Milk in 1954, with  
comparisons

Type & Origin	: 1938	: 1951	: 1952	: 1953	: 1954 1/
	: 1,000	: 1,000	: 1,000	: 1,000	: 1,000
	: <u>pounds</u>	: <u>pounds</u>	: <u>pounds</u>	: <u>pounds</u>	: <u>pounds</u>
	:	:	:	:	:
Dried Whole	:10,281	:14,982	:24,137	: 33,161	: 18,986
Australia	: 2,442	: 577	: 4,761	: 15,217	: 4,660
New Zealand	: 3,051	: 6,232	: 7,193	: 14,243	: 12,451
Ireland	: 979	: 5,068	: 4,397	: 3,629	: 1,722
Denmark	: 138	: 2,498	: 4,230	: 56	: 81
Netherlands	: 2,567	: -	: 2,685	: 8	: 72
Sweden	: -	: 606	: 871	: -	: -
Others	: 1,104	: 1	: -	: 8	: -
	:	:	:	:	:

United Kingdom:-Imports of Dried Milk in 1954, with  
comparisons (Continued)

Type & Origin	1938	1951	1952	1953	1954 1/
	1,000	1,000	1,000	1,000	1,000
	Pounds	Pounds	Pounds	Pounds	Pounds
Dried Skimmed	29,523	56,833	71,060	101,484	89,036
Australia	2,433	5,955	15,005	20,956	19,551
New Zealand	11,826	50,874	55,599	78,010	69,452
Ireland	280	-	449	449	24
Belgium	9	-	-	784	-
Denmark	7	-	7	1,285	7
Netherlands	7,545	-	-	-	2/
United States	6,206	-	-	-	-
Others	1,217	4	-	-	2

1/ Preliminary. 2/ Less than 500 pounds.

Total exports of dried milk from the United Kingdom showed considerable expansion in 1954 compared with a year earlier. As in previous years, exports were widely distributed, although approximately 60 percent were destined for Commonwealth countries. Western Germany was the single largest recipient.

United Kingdom:-Exports of Dried Milk in 1954, with  
comparisons

Type & Destination	1951	1952	1953	1954 1/
	1,000	1,000	1,000	1,000
	Pounds	Pounds	Pounds	Pounds
Dried Whole	4,426	2,872	3,871	3,777
British West Africa	268	168	292	162
Ceylon	321	25	20	158
India	719	203	283	345
Malaya	400	164	244	161
Malta	169	222	147	173
Ireland	322	276	904	117
Burma	164	111	455	517
Egypt	233	225	213	95
Western Germany	314	515	308	578
Indonesia	99	106	297	208
Others	1,417	857	708	1,263
Dried Skimmed	662	673	1,204	2,856
British West Africa	38	49	92	220
India	70	67	145	637
Malaya	34	11	272	107
Southern Rhodesia	9	17	40	306
Ireland	67	206	134	236
Burma	37	18	81	42
Egypt	63	73	60	95
Western Germany	-	-	5	761
Others	344	232	375	452

1/ Preliminary.



# EXPORTS OF MEAT AND DAIRY PRODUCTS TO U.S.S.R. AND SATELLITES

The U.S.S.R. and those European countries under its domination are fast becoming important importers of livestock products. Most of the Eastern European countries were once considered exporters of dairy and meat products, and some were self-sufficient in these products. The rigidly imposed austerity by the new regimes resulted in the deterioration of the livestock industry and obliged them to turn to non-Communist countries for imports.

During 1953 and 1954 the USSR and European satellite countries imported meat products in the following amounts:

Product	1953	1954
	Metric Tons	Metric Tons
Beef and Veal	8,300	81,900
Mutton and Lamb	6,200	26,600
Pork	8,100	9,000
Total	22,600	114,500

Dairy imports of these countries were given in Foreign Crops and Markets of March 28, 1955.

## DECLINE OF COTTON STOCKS IN U.K.

The continuing decline of cotton stocks in the United Kingdom during the first 5 months (August-December) of the 1954-55 marketing year has brought about the lowest stock figure reported for recent years, according to K. M. Greaves, American Consulate, Manchester.

It is reported from one source that stocks are lower than at any time since the American War between the States. Stocks of 695,000 bales (500 pounds gross) held on December 31, 1954, were 22 percent below the 896,000-bale level on July 31, 1954, and 25 percent below the 929,000 bales held on December 31, 1953. Unsold stocks of the Raw Cotton Commission on February 28, 1955, amounted to 58,977 bales, composed of: Egyptian 21,948 bales; Sudan 16,227; Abyan 9,910; Peruvian Tanguis 7,558; United States 1,741; and Mexican 32 bales. Spinners have been drawing on the RCC stocks for Egyptian, Sudan, and Peruvian cottons since present prices in those countries are now higher than the prices of the cotton held by RCC.

Cotton imports by the United Kingdom during the first 6 months (August-January) of the 1954-55 year amounted to 774,000 bales or slightly below imports of 799,000 bales in the corresponding period of the previous year. The United States share of imports in the current period, however, has shown a marked increase over the earlier period, amounting to 300,000 bales or 39 percent of total imports in August-January 1954-55, as compared with 155,000 bales or 19 percent of the total for the comparable period one year ago.



UNITED KINGDOM: Imports of cotton by countries of origin;  
averages 1935-39 and 1945-49; crop years 1952-53 and 1953-54;  
August-January 1953-54 and 1954-55

(Equivalent bales of 500 pounds gross)

Country of origin	Year beginning August 1				August-January	
	Averages		1952	1953	1953-54	1954-55
	1935-39:	1945-49				
	1,000	1,000	1,000	1,000	1,000	1,000
	bales	bales	bales	bales	bales	bales
Anglo-Egyptian Sudan..	143	195	127	238	144	66
Belgian Congo.....	1/	69	29	29	16	5
British East Africa..	35	65	107	79	35	27
British West Africa..	26	33	94	129	39	30
Egypt.....	617	379	72	220	97	27
India & Pakistan.....	416	125	120	118	54	21
Syria.....	1/	2/	12	46	32	18
Mexico.....	1/	2/	5	59	64	52
Argentina.....	43	4	95	48	42	35
Brazil.....	240	333	69	214	95	91
Peru.....	184	81	77	99	31	31
Soviet Union.....	1/	3/	36	16	9	4
United States.....	1,348	487	366	413	155	300
Other countries.....	76	6	55	91	12	93
Total.....	3,128	1,830	1,316	1,790	799	774

1/ If any, included in "Other countries". 2/ 1949-50 only available figure.  
3/ 2-year average.

Source: Trade and Navigation of the United Kingdom; the Raw Cotton Commission; reports from Agricultural Attaches and other U. S. representatives abroad.

Total cotton consumption in the United Kingdom amounted to 792,000 bales in the first 5 months (August-December) of the 1954-55 marketing year, an increase of 4 percent over consumption of 760,000 bales in the corresponding period of 1953-54. A sharp decline in mill activity around Christmas reduced December consumption, but improvement for January is evidenced by yarn output, which was 4-1/2 percent higher in January than in December and only slightly below January 1954.

Activity in the Liverpool futures market in March was marked by caution, with traders apparently determined to hold their stocks to minimum levels in the event of sharp price adjustments. Business in spot cotton was reportedly restricted as a result of slow trading in cotton yarn. Price quotations at Liverpool for representative qualities of the principal growths for the dates specified are shown in the table on the following page:

## Cotton: Spot quotations in Liverpool, February-March 1955

Growth	1955				
	Feb. 7	Feb. 18	Mar. 4	Mar. 8	Mar. 10
	(Equivalent U.S. cents per pound)				
American Middling 15/16 inch.....	38.13	37.71	37.34	36.73	37.12
Peruvian Tanguis 1-3/16 inch.....	46.11	46.08	46.20	45.91	45.63
Brazilian Sao Paulo Good.....	37.87	37.56	37.66	37.66	37.66
Egyptian Karnak (nominal).....	61.18	60.57	59.86	58.99	58.41
Egyptian Ashmouni (nominal).....	45.82	44.63	44.17	43.59	43.30

EUROPEAN WINTER WHEAT OUTLOOK  
GENERALLY FAVORABLE

Winter wheat acreage in Europe normally amounts to about 90 percent of the total. Fall-sown wheat came through the past winter in generally good condition over most of Europe. Reports to date indicate that winter-kill was average or less despite extreme variations in temperature with alternate freezing and thawing in parts. Weather was unfavorable for spring work in a number of areas, and in mid-April, though spring seeding was becoming more active, it was still behind schedule in parts. Soil conditions were mostly satisfactory at latest report.

Increased acreage is reported in a number of the larger producing countries, but fall-sown acreage was sharply reduced in the United Kingdom, the Low Countries and parts of Scandinavia. It is still too early for a reliable indication of the extent to which these shortages can be made up by increased spring wheat acreage, but it seems unlikely that the total wheat acreage will be as large as in 1954 in those countries.

The situation in the principal wheat-producing countries follows. The acreage under winter wheat in France is one of the largest of recent years though not quite equal to a year ago. The condition of the winter crop is satisfactory and prospects indicate that an above-average production is probable.

Prospects in Italy are very favorable. Good weather favored fall seeding, and total acreage is believed to be larger than in 1954. Weather conditions have been favorable to date and moisture supplies excellent in most areas. Increased use of fertilizer and selected seed also contributes to the favorable outlook.

Some decrease in winter wheat acreage is estimated for Western Germany, where heavy fall rains interfered with seeding. Condition of winter grains was mostly satisfactory at latest report, but spring seeding was very backward, running at times as much as 3 weeks behind normal.



Dry conditions hampered fall seeding operations in Spain but acreage under winter wheat appears to be as large as that of any recent year, despite that handicap. Light rains in December and heavy rains in January improved the outlook materially, and prospects were mostly satisfactory at latest report.

Weather conditions in the United Kingdom were distinctly unfavorable for fall seeding as a result of heavy rains and extensive flooding. Winter wheat acreage early in December was estimated to be only about half the acreage seeded at that time a year earlier.

Winter wheat acreage has amounted to 62 to 75 percent of the total wheat acreage in recent years. This is a smaller percentage than in earlier years, reflecting increased mechanization, which permits more timely operations. It would appear unlikely, however, that the full arrears in seeding of winter wheat could be made up in increased spring seeding, especially since spring field work has been delayed by excessive moisture.

Conditions in the Danube Basin countries are generally good. Fall seeding conditions in Yugoslavia and Hungary were better than those for Rumania and Bulgaria. In Yugoslavia, the acreage is reported to be slightly larger than for 1954. Following an exceptionally mild winter, conditions for spring work were reported favorable.

Fall seeding took place under generally favorable conditions in Hungary. Crops developed well but acreage of winter grains was slightly below that of 1954 partly because of a shortage of seed, according to reports. Farmers were urged to increase the acreage of spring grains to make good the arrears in fall sowing. Wet, cold weather, however, was making field work difficult in mid-March.

Seeding of wheat in Rumania in the fall of 1954 was delayed mainly because of the late corn harvest, on the basis of incomplete information. A mild winter, with more precipitation than in 1953 was reported. Spring work has been curtailed by heavy rains and late snow.

In Bulgaria also, fall seeding of wheat was delayed in certain areas because of dry weather. Spring work as well has been delayed by unfavorable weather conditions, principally late snows.

Wheat prospects are favorable in Greece, where weather conditions favored fall seeding and development of the grain. Good rainfall has been reported for most areas, with flooding in some areas. Damage from flooding was not believed to have materially affected the over-all prospects for the country, at latest report.



# JAPAN REDUCES COTTON IMPORTS AS CONSUMPTION DECLINES

Imports and consumption of cotton in Japan during the first 6 months (August-January) of the 1954-55 marketing year were considerably below the corresponding period of 1953-54, with imports dropping 17 percent and consumption declining 7 percent, according to L. E. Gleek, Jr., and S. Kondo, American Consulate General, Kobe.

Imports of 973,000 bales (500 pounds gross) in the current period compared with 1,174,000 bales imported in the similar period of the previous year. The United States share of Japan's imports increased from 342,000 bales or 29 percent of the total in August-January 1953-54 to 355,000 bales or 36 percent of the total in August-January 1954-55.

JAPAN: Imports of cotton from major countries of origin; average 1935-39; crop years 1951-52 to 1953-54; August-January 1953-54 and 1954-55

(Equivalent bales of 500 pounds gross)

Country of origin	Crop year beginning August 1				August-January	
	Average	1951	1952	1953	1953-54	1954-55
	1935-39					
	1,000	1,000	1,000	1,000	1,000	1,000
	bales	bales	bales	bales	bales	bales
Argentina.....	1/	2.9	46.1	79.6	66.4	11.0
Brazil.....	202.5	45.3	29.9	210.5	89.7	141.6
British East Africa.....	66.1	22.5	30.9	21.4	4.6	5.8
Burma.....	1/	22.6	46.6	49.3	20.7	10.9
Egypt.....	139.7	42.4	84.6	92.7	45.0	33.2
India.....	1,250.5	47.0	171.8	67.8	31.8	32.4
Iran.....	1/	2/	19.0	61.8	21.0	10.7
Mexico.....	1/	147.6	503.2	475.7	294.1	294.5
Pakistan.....	3/	233.3	439.0	310.8	209.9	43.4
Paraguay.....	1/	0	11.1	1.7	1.7	7.0
Peru.....	1/	6.5	20.0	12.5	9.5	9.2
Sudan.....	1/	.1	12.4	1.3	1.0	1/
United States.....	1,126.6	1,063.8	625.1	942.4	341.8	355.2
Other countries.....	4/ 391.2	6.7	15.5	5/ 104.0	37.0	18.4
Total.....	3,176.6	1,640.7	2,055.2	2,431.5	1,174.2	973.3

1/ If any, included in "Other countries". 2/ Less than 50 bales.

3/ Included in India. 4/ China 232.1. 5/ Turkey 49.3, Nicaragua 22.0, and Afghanistan 17.3

Source: Monthly Return of the Foreign Trade of Japan; All Japan Cotton Spinners Association.

Japanese consumption of cotton amounted to 1,056,000 bales in the period August-January 1954-55, a decrease from the 1,138,000 bales consumed in the corresponding 6 months of the previous year. Consumption in January 1955 amounted to only 162,000 bales, dropping from the average monthly rate of 180,000 bales maintained in the preceding 4 months, September-December 1954.

The long New Year's holidays plus the large inventories of finished goods were contributing factors in the January decline. Recent action by the Government to stabilize the cotton industry during this period of decline has included additional credit facilities and reduced taxes for traders, and a system of designating qualified firms for trading in certain areas.

Operable spindleage at the end of January 1955 numbered 7,883,614 spindles or 20,304 less than at the end of December 1954. Part of this decrease was reportedly due to the change of some cotton spindles to rayon staple spinning. The January ratio of operated to operable spindles was 85.2 percent. January weaving capacity and operations were as follows:

	<u>Looms operated in January</u>	<u>Operable looms January 31</u>	<u>Ratio</u>
Spinner-weavers	63,328	81,102	78.1
Independent weavers	<u>227,416</u>	<u>268,329</u>	<u>84.8</u>
Total	290,744	349,431	83.2

Japan's cotton stocks on January 31, 1955, amounted to 483,000 bales improving somewhat from the low stocks recorded for the 2 prior months, but below stocks of 558,000 bales held on January 31, 1954. These stock figures apparently include some cotton on order but not yet arrived in Japan.

Cotton prices in Japan are world prices plus charges for insurance, freight, and commissions. Recent quotations will indicate the extent of the CIF factor.

Cotton: CIF quotations in Japan, February-March 1955

Growth	1955	
	February 10 (Equivalent U. S.)	March 10 cents per pound)
Pakistan NT RG.....	34.46	34.11
Egyptian Ashmouni C&I.....	47.40	46.40
Mexican SM 1-1/16 inch.....	39.90	39.10
U.S. Middling 15/16 inch.....	37.90	37.15



# IRAN'S 1955 OILSEED PROSPECTS GOOD

Production of oilseeds in Iran in 1955 is forecast at 161,700 short tons, against 141,800 tons in 1954 and 152,800 tons in 1953, reports Henry C. Lint, Agricultural Attache, American Embassy, Tehran. Olive production in 1955 was forecast at 11,600 tons, or the same as in 1954. Animal fat production is expected to be up slightly from the 1954 output of around 22,600 tons. Only minor quantities of fish oil are produced in Iran.

## IRAN: Production of oilseeds, forecast 1955 with comparisons (Short tons)

Oilseeds	1953 <u>1</u> /	1954 <u>2</u> /	1955 <u>3</u> /
Cottonseed.....	110,000	99,000	121,000
Sesame seed.....	11,000	11,000	11,000
Castor beans.....	8,300	8,300	8,800
Poppy seed.....	16,500	16,500	16,500
Flaxseed.....	4,400	4,400	4,400
Other oilseeds.....	2,600	2,600	4/
Total.....	152,800	141,800	161,700

1/ Revised. 2/ Estimated. 3/ Forecast. 4/ Negligible.

Source: American Embassy, Tehran.

Facilities for crushing oilseeds in Iran are limited. Total production of vegetable oils in 1955, including olive oil, is forecast at 18,400 tons, as compared with 16,900 tons in 1954.

During the 12-month period March 21, 1953, to March 20, 1954, exports of oilseeds from Iran totaled 25,465 tons and included: Poppy seed--12,518 tons; flaxseed--2,370 tons; cottonseed--4,844 tons; castor beans--1,236 tons; sesame seed--4,000 tons; sunflower seed--126 tons; peanuts--68 tons; and other oilseeds--303 tons. Germany was the principal destination with 9,560 tons going to that country. Exports to the United States totaled only 668 tons.

Imports of fats and oils into Iran during March 21, 1953, to March 20, 1954, included 2,375 tons of coconut oil, 3,817 tons of compound fats and hydrogenated oils, 179 tons of marine oils, 779 tons of other vegetable oils, and 265 tons of other animal fats.

Wholesale prices of certain vegetable oils on the Tehran market, as of March 30, 1955, in rials per kilogram (U. S. cents per pound in parentheses) were:



Imported hydrogenated oil--45 to 70 rials (63-98 cents; local hydrogenated oil--45 to 60 (63-84); cottonseed oil--22 to 45 (31-63); poppy seed oil--30 to 40 (42-56); sesame seed oil--40 to 60 (56-84); linseed oil--27 to 30 (38-42); and castor oil--17 to 20 rials (24-28 cents). Oil-cakes and meals were quoted at 4,000 to 4,500 rials per metric ton (\$112-\$127 per short ton), most of which is exported to Germany.

#### INDIA'S HYDROGENATED VEGETABLE OIL MILLING INDUSTRY

India's hydrogenated vegetable oil milling industry consists of 34 mills employing power and employing 20 or more workers, according to Tilmer O. Engebretson, Agricultural Attache, American Embassy, New Delhi. The extent and geographical distribution of the industry as revealed by the Census of Manufacturing Industries, 1952 is shown in the following tabulation:

INDIA: Manufacture of hydrogenated oils by mills employing power and employing 20 or more workers

Items	Bombay	West Bengal	Madras	Uttar Pradesh, Bihar, Madhya Pradesh, Punjab, Delhi, Orissa and Saurashtra	Total
Mills existing (No.)...	11	7	5	11	34
Mills reporting (No.)...	11	5	5	11	32
Average no. days worked:	255	244	217	251	246
Materials consumed					
Quantity (long tons)					
Peanuts (in shell)...	7,812		3,485	14,779	26,076
Peanut (kernels).....	51,420		12,389	9,602	73,411
Peanut oil.....	56,084	28,702	12,163	44,935	141,884
Production					
Quantity (long tons)					
Edible					
Hydrogenated oils...	76,819	25,692	13,825	55,727	172,063
Industrial					
Hydrogenated oils...	4,979	2,426	1,701	512	9,618

Source: Indian Trade Journal, March 12, 1955.

The Government of India has set up a committee to study the entire question of the oilseed crushing industry (including crushing by village ghanis, or bullock-powered crushers).

The committee has been asked to carry out a rapid survey of the state of the oilseed crushing industry (crushing both by mills and by village ghanis) in the country and to recommend the lines on which this industry should be developed in the future. It has been particularly told to examine and report: "(a) whether it is necessary to increase or reduce the existing oilseed crushing capacity of mills in the country; (b) whether it would be desirable to reserve any particular oilseeds for crushing by the village ghani only having regard to the effect of such reservation on the efficiency of production of oil and its nutritional value and having regard further to its effect on employment, supply of oil to consuming industries, and exports; and (c) whether it is necessary to give any assistance to the village oil-crushing industry and, if so, in what form."

#### OLIVE OIL WORKING PARTY CONVENES IN ROME

The Food and Agriculture Organization (FAO) Working Party on Olive Oil convened in Rome from March 7 to March 18. Agricultural Attache Raymond Ogg, American Embassy, Rome, attended the meetings as an official observer for the United States.

The Working Party set up two Commissions--a Technical Commission and an Economic Commission. The Technical Commission reviewed the principles regarding the grades and standards set up at the previous meeting. The principal problem here was how certain lower grades of Italian oil should be fitted into the system. The French, the Spanish, and the Greeks would like to have them excluded from the category of pure olive oil. The Italians resisted this. Finally a compromise was worked out accommodating the Italians.

The Economic Commission concerned itself with the problems of evening out over a period of time the variations in olive oil supplies which result from an alternation of bumper crops and short crops of olives in the Mediterranean area. The group was unanimous in favoring an olive oil agreement that would set up an Olive Oil Council, establish grades and standards and take other measures to make olive oil a more readily marketable commodity. This would include; (1) the development of central markets or even commodity exchanges in the principal olive oil producing countries; (2) the development of a code of fair trade practices and standards; (3) the creation of an international arbitration board; (4) the adoption by the various countries of an international form of sales contract; and (5) the development of a form of "warrant" that should give to international lenders assurance that they could sell the stocks pledged as security in foreign markets without interference by any trade or exchange controls of the producing countries.

The Working Party agreed that the international conference should be called at the earliest possible date, preferably in June or as soon thereafter as practicable, as the countries desirous of obtaining an olive oil agreement hope to get it into effect this year.



# ANTARCTIC WHALE OIL OUTPUT DOWN; SPERM OIL UP SHARPLY

Total production of whale and sperm oil during the 1954-55 Antarctic season was around 362,690 and 52,830 short tons, respectively, according to preliminary data reported by Jerome T. Gaspard, Counselor of Embassy for Economic Affairs, American Embassy, Oslo. This represents a decrease of nearly 10 percent in whale oil production when compared with the final 1953-54 figure of 399,665 tons. Sperm oil production, however, was almost twice the 26,990 tons produced in the previous season.

Pelagic production by the 19 expeditions operating in 1954-55 accounted for 329,720 tons of the whale oil produced and 52,070 tons of the sperm oil. The remaining quantities resulted from South Georgia shore-station operations.

# NORWAY'S OUTPUT OF SEAL BLUBBER UP

Norwegian sealing operations in 1954 resulted in a total catch of 259,194 animals from which about 5,760 short tons of blubber was obtained, according to William F. Spengler, Second Secretary, American Embassy, Oslo. This is an increase of one-half from the 1953 output of 3,810 tons but under 1952 and 1951 productions of 6,560 and 9,300 tons, respectively.

Norwegian sealing expeditions operate in the spring and summer in five areas of the Arctic. Most of the sealing is conducted in international waters in the area of drift ice known as the Western Icefields located east of Greenland and north of Iceland.

In addition to sealing, Norwegian vessels engaged in Greenland shark fishing which yielded 226 tons of shark oil, or less than half the quantity produced in 1953.

# NETHERLANDS OILSEED IMPORTS LARGE

An article entitled "Netherlands to Import More Oilseeds in 1954-55" was published in Foreign Crops and Markets of November 29, 1954. The following statements--representing revisions of those made in that article--should be noted:

The Netherlands will import about 386,000 short tons of oilseeds in the year 1954-55, according to George J. Dietz, Agricultural Attache, American Embassy, the Hague. This represents an increase of about 30,000 tons from 1953-54.

It is anticipated that margarine production for 1954-55 may amount to almost 260,000 tons, as compared with about 94,000 tons of butter. Moreover, domestic consumption of margarine is expected to be more than 6 times greater than butter.



## GRAIN SUPPLIES IN EXPORTING COUNTRIES LARGE

Grain supplies in the 4 principal exporting countries on January 1, 1954 were estimated at 202 million short tons, according to information available to the Foreign Agricultural Service. This would be the largest January 1 supply for which records are available. The current estimate of the five principal grains is 4 percent above the previous record supply of a year ago, 13 percent above the January 1953 supply, and 46 percent larger than the 1945-49 average.

An increase over the past year is reported for each of the countries except Canada, where the supply is indicated to be about 14 percent less than at the beginning of 1954. The largest numerical gain was in the United States, with a total increase of about 12.6 million short tons over the January 1954 figure.

Moderate increases over the large January 1954 grain supplies account for this new record high for grain stocks. The only exception to the increases is for rye stocks, which though slightly less than at the beginning of 1954, are more than double the 1945-49 average. Wheat supplies in the 4 exporting countries are estimated at the record figure of 2,740 million bushels. Though only moderately above the large stocks of a year ago, this is 75 percent above the average for 1945-49. Based on current estimates, the quantity of wheat available for export or carry-over from current supplies in these countries is estimated at about 2,065 million bushels. This is a net increase of about 40 million bushels over the comparable figure for 1954, despite the reduction of 110 million in Canada's availability.

A breakdown by countries shows about 1,100 million bushels in the United States, available for export or for carry-over into the new crop year beginning July 1. Canada's availability is about 605 million bushels of wheat for export during the remainder of the season or for carry-over August 1, the beginning of the new crop season in that country.

Argentina's excess over domestic requirements for the current year on January 1 was estimated at 180 million bushels, about 35 million bushels more than on January 1, 1954. That figure represents the availability for export and for carry-over into the next crop year beginning December 1, 1955. A large carry-over in Australia more than offset a reduction in the crop, bringing availability for export or carry-over to 180 million bushels, the same as in Argentina. This is about 22 million bushels above the comparable figure for 1954.

Stocks of the 5 grains in the United States on January 1 were at the new record level of 145.9 million short tons, about 9 percent above the previous record stocks at the beginning of 1954 and 46 percent above the 1945-49 average. Increases in wheat and corn are greatest on a tonnage basis, but increases in oats and barley were also substantial. The wheat stocks of 1,460 million bushels in all positions set a new record, topping the previous record last year by 10 percent. The record stocks of corn still on hand, 2,799 million bushels, exceed the previous record stocks of January 1, 1950, by 113 million bushels.

Grains: Estimated supplies in the principal exporting countries, January 1, 1945-1955 1/

Country and year	Wheat	Rye	Barley	Oats 2/	Corn	Total
	Million bushels	Million bushels	Million bushels	Million bushels	Million bushels	1,000 short tons
<b>United States</b>						
1945	828	26	213	784	2,123	102,668
1946	682	13	192	1,059	1,892	95,352
1947	642	8	176	925	2,184	99,660
1948	801	14	188	770	1,535	84,234
1949	865	17	230	953	2,573	119,238
Av. 1945-49	764	16	200	898	2,061	100,230
1950	900	17	191	841	2,686	120,721
1951	1,002	18	244	941	2,610	124,556
1952	853	16	203	913	2,357	111,514
1953	1,106	9	164	859	2,558	122,736
1954	1,332	22	178	837	2,682	133,336
1955 3/	1,460	25	284	1,016	2,799	145,944
<b>Canada</b>						
1945	592	8	140	395	4/	28,059
1946	345	3	100	280	4/	17,594
1947	340	4	110	295	4/	17,967
1948	300	5	115	225	4/	15,725
1949	335	18	115	265	4/	17,819
Av. 1945-49	382	8	116	292	4/	19,433
1950	325	12	90	240	4/	16,326
1951	440	13	140	325	4/	22,449
1952	555	17	220	415	4/	29,461
1953	685	28	255	405	4/	34,339
1954	810	30	265	370	4/	37,790
1955 3/	705	28	235	285	4/	32,419
<b>Argentina</b>						
1945	330	13	35	90	130	16,184
1946	225	15	53	72	40	10,714
1947	240	24	60	55	40	11,312
1948	270	26	55	60	90	13,628
1949	245	30	35	75	95	12,890
Av. 1945-49	262	22	48	70	79	12,916
1950	230	20	25	70	70	11,140
1951	215	25	35	60	10	9,230
1952	85	15	25	40	35	5,190
1953	275	50	54	85	25	13,006
1954	280	50	45	80	35	13,140
1955 3/	325	45	55	70	25	14,150
<b>Australia</b>						
1945	112	4/	6	12	4/	3,696
1946	145	4/	10	30	4/	5,070
1947	130	4/	13	25	4/	4,612
1948	220	4/	20	50	4/	7,880
1949	205	4/	15	30	4/	6,990
Av. 1945-49	162	4/	13	29	4/	5,650
1950	225	4/	20	40	4/	7,870
1951	215	4/	25	35	4/	7,610
1952	175	4/	25	45	4/	6,570
1953	205	4/	38	55	4/	7,942
1954	225	4/	40	55	4/	8,590
1955 3/	250	4/	30	50	4/	9,020
<b>Total</b>						
1945	1,862	47	394	1,281	2,253	150,607
1946	1,397	31	355	1,441	1,932	128,730
1947	1,352	36	359	1,300	2,224	133,551
1948	1,591	45	378	1,105	1,625	121,467
1949	1,650	65	395	1,323	2,668	156,937
Av. 1945-49	1,570	45	376	1,290	2,140	138,258
1950	1,680	49	326	1,191	2,756	156,060
1951	1,872	56	444	1,361	2,620	163,845
1952	1,668	48	473	1,413	2,392	152,735
1953	2,271	87	511	1,404	2,583	178,023
1954	2,647	102	528	1,342	2,717	192,856
1955 3/	2,740	98	604	1,421	2,824	201,533

1/ Data for Northern Hemisphere countries represent January 1 stocks; estimates for Southern Hemisphere countries include the new crop of small grains as well as stocks of old grain on January 1. 2/ Canadian oats, as reported in bushels of 34 pounds; other countries in bushels of 32 pounds. 3/ Preliminary estimate. 4/ Production small, and supplies believed to be negligible.

Foreign Agricultural Service. Prepared or estimated on the basis of official statistics, reports of Agricultural Attaches and other U. S. representatives abroad, or other information.



Stocks of rye were slightly more than the previous year's stocks and were well above average. Stocks of barley and oats were larger than those of a year ago and were sharply above average. The total of 102 million short tons for the 4 coarse grains sets a new record for stocks of these grains exceeding the previous record January 1 stocks of these grains in 1951 by 8 percent.

Grain stocks in Canada were estimated at 32.4 million short tons. This is somewhat below the large stocks of the past 2 years but is still sharply above average. The bulk of the decline from last year's stocks is in wheat and oats with a moderate decline in barley. Wheat stocks of 705 million bushels compared with 810 million on January 1, 1954 and the 1945-49 average of 382 million bushels.

Rye stocks remaining on January 1 were 28 million bushels, slightly less than the large stocks of the previous year but still more than triple the 1945-49 average. Stocks of oats at 285 million bushels are the smallest since 1950 and are slightly below the average of the 5 years ended 1949. Barley stocks are estimated at 235 million bushels, compared with 265 million a year earlier and the average of 116 million bushels.

The total supply of these grains in Argentina on January 1 was estimated at 14.2 million short tons. This is slightly more than at the beginning of 1954 and also above the average of 12.9 million tons in 1945-49. Larger supplies of wheat and barley offset reduced supplies of corn, barley and rye.

It should be noted that January supplies considered in this survey include estimates for the new small grains harvest, nearing completion at that time in Southern Hemisphere countries. Argentine corn, however, as is the case for all grains in Northern Hemisphere countries, represents stocks of old grain remaining on that date from preceding harvests. Thus, only small supplies of corn remain from the corn crop harvested in March-April, 1954.

The stocks estimate of 25 million bushels contrasts with the 1945-49 stocks averaging 79 million bushels. Above-average supplies of wheat and barley and average supplies of oats reflect good harvests of these grains recently completed. Rye supplies are double the average and are only about 10 percent below the large supplies of January 1954.

Total grain supplies in Australia on January 1 were estimated at the high level of 9.0 million short tons. This is well above average and about 5 percent above the January 1954 figure for these grains. Smaller harvests, recently completed, especially for wheat and barley were offset by larger carry-over stocks. The wheat supplies on hand January 1 were estimated at 250 million bushels compared with 225 million at the beginning of 1954 and the 1945-49 average of 162 million bushels. Both barley and oats supplies were slightly smaller than in January 1954 though they were about double the 1945-49 average.



U.S. COTTON  
EXPORTS LAGGING

Exports of cotton from the United States in February amounted to only 319,000 bales of 500 pounds gross weight (307,000 running bales). This is 28,000 bales below the January total and 81,000 below that for February a year ago.

Exports of 2,359,000 bales (2,267,000 running bales) during August-February 1954-55 are still 18 percent above the total of 1,994,000 bales for a similar period a year ago. Exports in the second half of last season amounted to 2,321,000 bales or 59 percent of the season's total. Recent reports from abroad indicate that the export volume during the second half of the current season will not reach this figure and the total for the season may be somewhat less than the Department's earlier forecast.

The recent downturn in exports of cotton is slightly more than seasonal. This may be attributed to the fact that practically all foreign spinning mills that use imported cotton are reported to be buying only to meet minimum requirements. In many countries stocks have been reduced to the lowest level in postwar years. Most foreign cotton exporting countries also are reporting declines in cotton exports as shown on the table on page 511.

Prices of United States cotton have remained on a competitive level with most similar foreign growths for about a year. Uncertainty in regard to prices for cotton entering international trade in coming months is the principal cause for lack of buying interest abroad.

Demand for foreign-produced cotton yarns and textiles has not declined in proportion to the reduction in purchases of raw cotton. Stocks of cotton are now at such low levels that further reductions in stocks do not appear to be possible without restricting mill operations. When the uncertainty in regard to prices is eventually removed from the market, whether they are stabilized at higher or lower levels, there will no doubt be increased purchases of cotton to rebuild depleted stocks as well as to meet current mill requirements. Most foreign cotton mills (except in Japan) operated during the first half of the current season at rates slightly above the record levels of 1953-54.

The amount of cotton authorized to date for shipment in 1954-55 under the various export trade programs is about 1.3 million bales with a total value of about \$240.5 million. The 1.3 million bales includes about 482,000 bales carried over from last year's U. S. Foreign Operations Administration program and about 655,000 bales authorized for export sale under Public Law 665 and Title II of Public Law 480. It also includes 155,000 bales authorized for sale under Title I of Public Law 480 administered by the U.S. Department of Agriculture.

UNITED STATES: Exports of cotton by countries of destination;  
averages 1935-39 and 1945-49; crop years 1952-53  
and 1953-54; August-February 1953-54 and 1954-55

(Equivalent bales of 500 pounds gross)

Country of destination	Crop year beginning August 1					
	Averages		1952	1953	August-February	
	1935-39	1945-49			1953-54	1954-55
	1,000	1,000	1,000	1,000	1,000	1,000
	bales	bales	bales	bales	bales	bales
Austria.....	0:1/	36:	47:	42:	28:	12
Belgium-Luxembourg.....	169:	131:	73:	68:	29:	56
Czechoslovakia.....	65:	57:	0:	0:	0:	0
Denmark.....	33:	14:	34:	23:	13:	14
Finland.....	35:	21:	4:	10:	0:	0
France.....	662:	575:	507:	475:	259:	309
Germany.....	511:	340:	241:	389:	189:	277
Italy.....	442:	489:	272:	269:	156:	169
Netherlands.....	107:	131:	79:	104:	52:	71
Norway.....	17:	7:	11:	14:	7:	8
Poland and Danzig.....	180:	69:	0:	0:	0:	0
Portugal.....	36:2/	:	1:	0:	0:	0
Spain.....	108:	69:	77:	167:	90:	72
Sweden.....	115:	12:	36:	43:	24:	39
Switzerland.....	11:	26:	28:	24:	18:	34
United Kingdom.....	1,346:	488:	359:	422:	213:	314
Yugoslavia.....	17:	47:	86:	40:	21:	40
Other Europe.....	31:3/	33:	6:	10:	5:	5
Total Europe.....	3,885:	2,545:	1,861:	2,100:	1,104:	1,420
Australia.....	9:	7:	11:	45:	18:	31
Canada.....	301:	275:	284:	237:	119:	192
Chile.....	9:	20:	1:	27:	10:	7
China.....	117:	401:	0:	0:	0:	0
Colombia.....	20:	24:	35:	7:	2:	1
Cuba.....	11:	16:	12:	20:	9:	15
French Indochina.....	22:	6:	18:	16:	12:	0
Formosa.....	4/	1:	107:	110:	63:	53
India.....	52:	86:	45:	161:	54:	56
Indonesia.....	2/	5:	17:	22:	15:	18
Israel.....	4/	5:	14:	12:	7:	11
Japan.....	1,142:	585:	691:	1,005:	499:	449
Korea, Republic of.....	4/	5/ 48:	41:	96:	57:	74
Philippines, Rep. of.....	2:	4:	16:	8:	3:	4
Other countries.....	19:6/	37:	28:7/	48:	22:	28
Total.....	5,589:	4,065:	3,181:	3,914:	1,994:	2,359

1/ 4-year average. 2/ Less than 500 bales. 3/ Includes Greece 21. 4/ If any, included in "Other countries". 5/ 3-year average. 6/ Includes Hong Kong 35. 7/ Includes Ethiopia 11, French Morocco 9, and Hong Kong 9.

Compiled from official records of the Bureau of the Census.



COTTON: Principal exporting countries, 1954-55  
August through month shown in heading

(Thousand bales of 500 pounds gross)

Country of destination	Brazil : Jan.	Egypt : Feb.	Mexico : Jan.	Pakistan : Feb.	Peru : Feb.	Sudan : Jan.	Turkey : Jan.
Belgium .....	20	13	15	4	24	2	8
Czechoslovakia .....	1	23	0	0	0	0	7
France .....	22	86	2	15	12	9	2
Germany .....	100	53	13	2	21	9	21
Italy .....	45	58	0	3	2	17	6
Netherlands .....	38	13	15	1	6	0	0
Poland .....	4	24	0	0	0	1	2
Spain .....	50	26	3	0	0	0	1
Sweden .....	8	3	0	2	1	1	0
Switzerland .....	1	28	3	0	10	0	2
United Kingdom .....	68	42	9	24	25	47	0
Yugoslavia .....	13	6	0	0	0	0	8
U.S.S.R. ....	0	46	0	0	0	0	0
Australia .....	1	1	0	3	0	0	0
Canada .....	4	0	0	0	0	0	0
Chile .....	1	0	0	0	34	0	0
China .....	28	22	0	21	0	0	0
Cuba .....	2	0	0	0	0	0	0
Formosa .....	0	2	0	0	0	0	0
Hong Kong .....	18	6	0	41	0	0	0
India .....	0	80	0	0	5	15	0
Japan .....	119	40	157	107	10	0	0
Korea .....	0	0	0	0	0	0	0
United States .....	1	33	1/ 664	4	20	1	0
Other countries .....	15	54	4	9	17	3	16
Total .....	559	659	885	236	187	105	73
Comparable period							
1953-54	636	863	672	541	179	228	203
12 months 1953-54	1412	1485	951	893	361	413	377

1/ Mostly for transshipment to Europe.

Compiled from official records.



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The Portuguese Tobacco Market. Foreign Agriculture Circular FT 12-55.

Development in the Cotton Industry of Pakistan since 1949. Foreign Agriculture Circular FC 3-55.

Germany: Importer of Egg and Poultry Products. Foreign Agriculture Circular FPE 6-55.

World Apple and Pear Production. Foreign Agriculture Circular FDAP 2-55.

Imports of Selected Agricultural Commodities Into the U.S. Foreign Agriculture Circular FTEA 2-55.

World Output of Dairy Products, Fourth Quarter and Annual, 1954. Foreign Agriculture Circular FD 2-55.

Marketing of Egg and Poultry Products in Cuba. Foreign Agriculture Circular FPE 7-55

World Hard Fibers Production Increases in 1954. FVF 4-55.

Marketing U.S. Livestock and Meat Products in Western Europe. Foreign Agriculture Circular FLM 3-55.

Wool Movement From Southern Hemisphere. Foreign Agriculture Circular FW 1-55

Review of the World Corn Crop. Foreign Agriculture Circular FG 14-55.

Marketing Dairy Products as Ghee and Recombined Milk in the Near and Middle East and Sections of Europe. Foreign Agriculture Circular FD 3-55.

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L A T E N E W S

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United States imports of cotton (for consumption) is February, 1955, amounted to 17,000 bales (480 pounds net) including 6,000 bales each from Egypt and Peru; 3,000 bales from Mexico; and 1,000 bales from India.

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Imports of cotton linters into the United States in February, 1955, amounted to 9,000 bales (480 pounds net). Mexico supplied 6,000 bales; the U.S.S.R. 2,000 bales; and Brazil 1,000 bales.

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Exports of cotton linters from the United States during February, 1955, totalled 30,000 bales (480 pounds net) compared with 37,000 bales in February, 1954. The exports in February, 1955 show the United Kingdom receiving 12,000 bales; Germany 10,000; Japan 4,000; Netherlands 2,000; and Belgium and Canada 1,000 bales each.

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The third official estimate of Pakistan's 1954-55 cotton crop is for an acreage of 3,057,000 acres and production of 1,194,000 bales (500 pounds gross). These figures are somewhat below earlier official estimates, and are also below current trade estimates which predict a crop between 1,225,000 and 1,265,000 bales. Pakistan's 1953-54 cotton crop was estimated at 1,215,000 bales from an area of 3,000,000 acres.

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The Government of India announced on April 12, 1955, an additional export quota of 100,000 Indian bales (81,667 bales of 500 pounds gross) of cotton not to exceed 3/4 inch, from current and previous crops. The quota is subject to the limitation that 35,000 Indian bales (28,600 bales of 500 pounds gross) be exported from Saurashtra ports. The Saurashtra area lies north of Bombay.

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